Demographics 1 – Member-Level – WINNIE Online Training Module

JANUARY 2024

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of the member-level information found on the Demographics page in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being January 16, 2024.

<Transition Slide>

<screen description – no audio> Slide transitions to the Demographics page in Hera See's participant folder.

Overview 1

Demographics has information that is specific to a household member as well as information that is shared by all members of the household.

We'll take a look at the Household Information panel in another module.

Overview 2

Demographics provides current member information, and some of it is over-written when changes are made.

For other fields, Demographics displays the most current but also maintains a history in the database.

First Row

We already reviewed the names, date of birth, and gender fields in the Prescreen modules.

WIC Category

We also reviewed the WIC Category in Prescreen.

However, changing the WIC Category is a topic all its own and we will review that topic in the next module.

PMI Number

The PMI Number is an 8-digit Personal Medical Identification number assigned by MN Health Care Programs.

We can use this number to verify proof of current participation in Medical Assistance or Medicaid and MN Care.

Our agency can choose whether to use this field and we should follow our agency's requirements.

Maiden Name 1

The Maiden Name fields are enabled for women…

Maiden Name 2

…and when completed display in all household members folders.

<screen description – no audio> Slide transitions to Curt See's Demographics page.

<Transition Slide>

<screen description – no audio> Slide transitions back to Hera See's Demographics page.

Maiden Name 3

Completing the Maiden Name fields may assist with matching WIC records with other health systems or data.

Again, our agency can choose whether to complete these fields and we should follow our agency's requirements.

Physically Present

Physically Present is read-only in the Participant Folder and displays their status at their most recent certification and was reviewed in the Certification training modules.

Homeless

The Homeless Fixed Nighttime Location becomes enabled if we indicate, in the Household modal, that the family is homeless.

Once enabled, it is required.

It is on the member-level Demographics page because family members could be staying at different locations.

Since this corresponds with a Household-level field, we'll look at it more closely in the Demographics – Household-level module.

Foster Care

We should toggle on Foster Care if the participant, regardless of their WIC Category, is currently living in a foster home.

Although WINNIE auto-assigns many risk factors, it will not assign Risk Factor 903-Foster Care when we toggle this on because it cannot assess whether the criteria, which is if the participant has entered or moved to different foster care within the past 6 months, is met.

If we toggle on Foster Care, we will need to assess for the risk factor and manually assign it if appropriate.

Medical Clinic and Provider

We already reviewed the Medical Clinic and Provider fields in the Certification modules.

Just a reminder, our Local Agency can make either of these fields required and if required, another option other than "No Selection" must be selected.

Insurance Type 1

Again, our Local Agency can choose to collect a participant's Insurance Type.

Let's click the dropdown to display the options.

<no audio> Click the Insurance Type dropdown.

Insurance Type 2

As always, we should follow our agency's guidelines on whether to select an option or not.

Click the dropdown again to close it.

Initial Contact

We will review Initial Contact in its own training module.

Local Use Questions 1

Local Use Questions allow our agency to collect information it's interested in obtaining for data and documentation purposes.

The questions and answers are created and maintained by our Local Agency, and are either never required, always required, or only required during certification.

Local Use Questions 2

Our agency can choose to display the questions for individual WIC categories or for all categories.

If the same question is created for each individual WIC Category instead of one question for all categories, the answer will automatically clear when the participant's WIC Category changes.

A history of each answer is maintained in the database for reporting purposes.

State Use Questions 1

State Use Questions are created by the State WIC Office to collect information that is important for reporting and data.

They are never required but best practice is to always select an answer when appropriate.

Go ahead and click the first State Use Question dropdown.

State Use Questions 1-1

State Use Question #1 collects information about breastfeeding exclusivity.

We can review the Breastfeeding Exclusivity reference document for more information about when to answer this question and how to select an answer.

Click the link to review the document then click the button when ready to continue.

State Use Questions 1-2

Click the dropdown to close it.

<no audio> Click the State Use Question dropdown.

State Use Questions 6-1

The second State Use Question collects the cultural identity of our non-Hispanic Black and Asian participants.

The question and its answers are stored in the database as question #6, which is important to know for data retrieval.

But it's also why we'll see #6 in the Cultural Identity document title when we review it instead of 2 as we may expect.

State Use Questions 6-2

We should try to answer this question right after we complete the Race/Ethnicity modal during the initial certification.

<screen description – no audio> Slide transitions to Race/Ethnicity modal with Non-Hispanic and Black or African American selected.

<Transition Slide>

<screen description – no audio> Slide transitions back to Hera See's Demographics page.

State Use Questions 6-3

Click the second State Use Question dropdown.

<no audio> Click the State Use Question dropdown.

State Use Questions 6-4

For our Black and Asian participants, we should provide a list of the options appropriate for their selected race and allow the participant or proxy to self-identify or identify for their children.

If they choose not to answer, we select Declined to Answer.

A printable list by race is provided on the last page of the Cultural Identity reference document.

State Use Questions 6-5

We can review the Cultural Identity reference document for more information about why asking this question is important and how to address it with our participants.

Go ahead and click the link to the document then click the button when ready to continue.

State Use Questions 6-6

Click the dropdown again to close it.

<no audio> Click the State Use Question dropdown.

Duplicate Participants 1

Go ahead and click below the scrollbar to view the rest of this page.

Duplicate Participants 2

Unfortunately, more than one record can be created for the same person if we aren't careful about double-checking in Statewide for participants that may be re-applying for the program.

WINNIE has a process to identify potential duplicate records based on specific criteria, and designated staff in our agency can use this process to label one of the participant's State WIC IDs as a duplicate record.

Duplicate Participants 3

If the participant has more than one MN WIC record, the Duplicate Participants section shows at the bottom of Demographics and displays the duplicate record's State WIC ID, participant's name, staff person who identified the record as duplicate, and the date it designated a duplicate.

Duplicate Participants 4

Since the information saved in the duplicate participant folder is not merged into the current participant folder, we can view it in case there is information pertinent to continuation of care.

Click the View button.

Duplicate Participants 5

This opens the Duplicate Participant – View-only mode.

The information in the record begins with its Prescreen date to the date it was assigned its duplicate status.

All fields and activity buttons, such as Add, Edit, Delete, Save, etc. are disabled and no changes can be made, but all pages and content can be viewed.

For instance, select Benefits History from the sidebar.

Duplicate Participants 6

We can't filter but we can view the benefit sets issued.

Notice that our most recent activity was 2021.

OK. Toggle on the first set.

Duplicate Participants 7

The duplicate folder has a Participant Menu as well.

Go ahead and open it…

<no audio> Click the Participant Menu.

Duplicate Participants 8

However, there are only a few options.

We're going to quickly jot down this State WIC ID.

To return to the active folder, we click the Close button. Go ahead and do that.

Duplicate Participants 9

It always returns to the Demographics page.

A little side note, we could have also clicked Search to close out of the entire folder from within the duplicate record.

One last thing…select Search from the sidebar.

Duplicate Participants 10

Go ahead and clear the search page.

<no audio> Click the Clear button.

Duplicate Participants 11

We're going to look up the duplicate record, which hasn't had any activity since 2021.

Where should we search? Click anywhere for a hint.

<audio – hint> Records without activity for 6 months are purged to Statewide. Click the Statewide button.

Duplicate Participants 12

Now let's search by our duplicate record's State WIC ID.

Go ahead. Click anywhere for a hint.

<no audio> Search by the duplicate record's State WIC ID: 1261477. Click anywhere for a hint.

<audio – hint> Click into the State WIC ID field.

Duplicate Participants 13

Do not type the preceding zero.

<no audio> Search by the duplicate record's State WIC ID: 1261477. Click anywhere for a hint.

<audio – hint> Type: 1261477

Duplicate Participants 14

<no audio> Search by the duplicate record's State WIC ID: 1261477. Click anywhere for a hint.

<audio – hint> Click the Search button or press the Enter key.

Duplicate Participants 15

Duplicate Participant displays on the card and if we try to open the folder…

Go ahead and double-click on the card to do that…

<no audio> Double-click the card to open the participant folder.

Duplicate Participants 16

…a message displays informing us of the current active record's State WIC ID.

When we click OK on the message…

<no audio> Click the OK button.

Duplicate Participants 17

…the system does not open the duplicate folder and returns us to the Search page.

This completes our review of the member-level information in Demographics.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

WINNIE will auto-assign Risk Factor 903 – Foster Care when we toggle on Foster Care on the Demographics page.

Answer #1

The answer is False.

Risk Factor 903 – Foster Care requires assessment that the system cannot make. That is, it can only be assigned if the participant has entered foster care or changed foster homes in the past 6 months.

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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