

# Initial Contacts 1B – WINNIE Online Training Module

MARCH 2024

## Introduction

### Intro

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

### Date 1

All dates in the first section of this module are based on today's date being March 12, 2024.

### <Transition Slide>

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

### Overview 1

As we learned in the previous module, best practice is for the staff person who schedules the appointment to create or complete the Initial Contact.

WIC agencies can use different scheduling processes, such as same-day or flexible whereby participants are asked to call to schedule their appointment on the day or week of their next nutrition contact or the more traditional scheduling in which appointments are scheduled at a nutrition contact 3 months in advance, or a combination of these.

In this module, we will start by taking a look at how to document the Initial Contact if we are unable to offer a first appointment offered date such as can occur with same-day or flexible scheduling or when rescheduling an appointment.

### IC & Cert Due 1

Here is our scenario.

Pearl Lee has called to schedule certification appointments for her children and a new pregnancy appointment for herself.

Viewing their Show Details, we can see Brock was due for a cert at the end of February, so he needs an Initial Contact.

Click on Earl's card.

<no audio> Click on Earl's card to view his details.

PARTICIPANT: "Hi! My name is Pearl Lee. I'm calling to schedule appointments for my kids and myself since I'm pregnant."

WIC STAFF: I'm glad you called. Let me see what we still have available this week...

## IC & Cert Due 2

Earl was also due in February and also needs an Initial Contact.

Click on Ginger's card.

<no audio> Click on Ginger's card to view her details.

## IC & Cert Due 3

Ginger isn't due until the end of this month, so doesn't require an Initial Contact.

Click on Pearl's card.

<no audio> Click on Pearl's card to view her details.

## IC & Cert Due 4

Pearl is going to be certified as newly pregnant, which requires an Initial Contact.

Click below the scroll bar in her card then click on the calendar icon to open the Scheduler.

<no audio> Click below the scroll bar on Pearl's card then click the calendar icon to open the Scheduler.

## IC & Cert Due 5

<no audio> Click below the scroll bar on Pearl's card then click the calendar icon to open the Scheduler.

## <Waiting>

<screen description – no audio> Spin icon displays.

## IC & Cert Due 6

Let's collapse the Schedule Appointment card for more real estate.

<no audio> Click to collapse.

## IC & Cert Due 7

We have schedules through Thursday, March 14.

We know there was only one 15-minute appointment, which was available earlier for today.

Let's look at the 13<sup>th</sup>.

<no audio> Click the Forward icon.

<Waiting>

<screen description – no audio> Spin icon displays.

## IC & Cert Due 8

Nothing...

Click below the internal scroll bar.

## IC & Cert Due 9

Nothing that would really work for 4 certs...

Click the scroll bar again.

## IC & Cert Due 10

And completely booked.

We have one more day to review and need at least 2 hours for our family of four.

Click the forward icon then click below the internal scroll bar to review March 14th for available appointments.

<Waiting>

<screen description – no audio> Spin icon displays.

## IC & Cert Due 11

<no audio> Click the forward icon then click below the internal scroll bar to review March 14th for available appointments.

## IC & Cert Due 12

<no audio> Click the forward icon then click below the internal scroll bar to review March 14th for available appointments.

## IC & Cert Due 13

We saw a couple of short appointments, but nothing we could actually offer.

We'll be adding more schedules, but they won't be available until tomorrow, so we are going to ask her to call back tomorrow morning.

However, the **request** for the appointment was today so we need to **create** the Initial Contact.

Tomorrow, when Pearl is offered an appointment, it can be completed.

Go ahead and re-expand the Schedule Appointment card.

WIC STAFF (thought bubble): We have some short appointments, but nothing that is going to work for a family for whom we need at least 2 hours.

WIC STAFF (thought bubble): I know we'll be adding more schedules come tomorrow...

WIC STAFF: I am so sorry! We don't have any appointments that would work but we will have more options tomorrow. Can you call us back tomorrow?

PARTICIPANT: "OK. If that's what I have to do..."

## IC & Cert Due 14

Click the Initial Contact button.

## IC & Cert Due 15

Go ahead and start Pearl's Initial Contact.

<audio – hint> Click the New Contact button.

## IC & Cert Due 16

Select her WIC Category.

## IC & Cert Due 17

<no audio> Select her WIC Category.

<audio – hint> Select Pregnant.

## IC & No Appts 1

When we are unable to offer an appointment, we must explain why we can't complete the First Appointment Offered date in the Comments field.

Click into the field and we'll type our comment...

## IC & No Appts 2

We're going to type: No appts available – asked Pearl to call back tomorrow on 3/13.

## IC & No Appts 3

This time, we'll click the Save button instead of Save & Close so that we can use the Participant Menu to complete the Initial Contacts for Brock and Earl as well.

Click Save.

<no audio> Click the Save button.

## IC & Participant Menu 1

<waiting> <screen description – no audio> Spin icon displays.

Go ahead and click the Participant Menu.

## IC & Participant Menu 2

We should note that we could also complete an Initial Contact for Ginger whose cert ends later this month, and therefore, doesn't require one.

Many agencies will choose to complete Initial Contacts for all participants regardless of requirements so as to ensure none are missed, and we should follow our agency's guidelines.

Select Brock.

<no audio> Select Brock from the list.

## IC & Participant Menu 3

<waiting> <screen description – no audio> Spin icon displays.

Complete Brock's then Earl's Initial Contacts. Click anywhere for a hint.

<audio – hint> Click the New Contact button.

## IC & Participant Menu 4

Notice that our comment from Pearl's Initial Contact populates the comment for Brock's.

When we use the Participant Menu to complete multiple members' Initial Contacts, **on the same date as the initial contact is created**, any changes we make (excluding WIC Category), will auto-populate for the next members.

## IC & Participant Menu 5

This function is helpful, but a little limited because changes only populate forward, not backward.

So, if we change any of these fields when completing the Initial Contact for Brock, the changes will display when we create our new Initial Contact for Earl, but those same changes will not be made to Pearl's Initial Contact since hers has already been saved.

Continue completing the Initial Contacts.

<no audio> Complete Brock's then Earl's Initial Contact. Click anywhere for a hint.

<audio – hint> Click the Save button.

## IC & Cert Due 18

<no audio> Complete Brock's then Earl's Initial Contact. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

## IC & Cert Due 19

<no audio> Complete Brock's then Earl's Initial Contact. Click anywhere for a hint.

<audio – hint> Select Lee, Earl from the list.

## IC & Cert Due 20

<waiting> <screen description – no audio> Spin icon displays.

<no audio> Complete Brock's then Earl's Initial Contact. Click anywhere for a hint.

<audio – hint> Click the New Contact button.

## IC & Cert Due 21

<waiting> <screen description – no audio> Spin icon displays.

<no audio> Complete Brock's then Earl's Initial Contact. Click anywhere for a hint.

<audio – hint> We're done. Click the Save & Close button to close the modal.

## Complete IC – No Appt 1

There is nothing more we can do until Pearl calls back to schedule her appointment.

<slide transition> <screen description – no audio> Slide transitions to topic slide.

## Date 2

All dates in the next section of this module are based on today's date being March 15, 2024.

## <Transition Slide>

<screen description – no audio> Slide transitions back to Search page.

## Complete IC – No Appt 2

Pearl has called back early on 3/15 to schedule her family’s appointments, which we know we have available today.

We’ve already reviewed the Show Details for everyone and know that they all need appointments, including mom, and that all except Ginger will need an Initial Contact.

We never assume the Initial Contact has been completed and should always double-check it when scheduling appointments.

Click below the scroll bar in Brock’s card and then click the calendar icon to open the Scheduler.

## Complete IC – No Appt 3

<no audio> Click below the scroll bar in Brock’s card and then click the calendar icon to open the Scheduler.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Complete IC – No Appt 4

We can offer an appointment today and mom and the kids are able to be at the clinic by 9:00.

Double-click the 9AM cell in the EA11 column.

## Complete IC – No Appt 5

<Waiting> <screen description – no audio> Spin icon displays.

We’re scheduling for the household.

<no audio> Click the Schedule for Household button.

## Complete IC – No Appt 6

This bears repeating. Best practice: If an Initial Contact is required always double-check it’s been completed.

Click the button.

<no audio> Click the Initial Contact button.

## Complete IC – No Appt 7

We don't need to keep the first comment. It no longer applies.

We just need to document the first appointment offered was 3/15 (even if it wasn't accepted).

Click three times inside the comment box to highlight the comment.

## Complete IC – No Appt 8

<no audio> Click three times inside the comment box to highlight the comment.

## Complete IC – No Appt 9

Type: appt 3/15 or appointment 3/15

## Complete IC – No Appt 10

Click the Save button then select Earl from the Participant Menu.

## Complete IC – No Appt 11-12

<no audio> Click the Save button then select Earl from the Participant Menu.

## Complete IC – No Appt 13

Notice the change we made to the comment did not automatically populate since that only occurs if the changes are made on the date the Initial Contact is created and only for new Initial Contacts that haven't been saved, which means we must update all of the Initial Contacts.

Let's repeat what we just did for Brock.

Click three times, type: appt 3/15, and Save then repeat for Pearl (except Save & Close when done).

## Complete IC – No Appt 14-21

Displays on Complete IC – No Appt 14-21: <no audio> Click three times, type: appt 3/15, and Save then repeat for Pearl (except Save & Close when done).

## Complete IC – No Appt 21

<audio – hint> We're done. Click the Save & Close button to close the modal.

## <Transition Slide>

We're going to complete scheduling the appointments since that isn't our focus.



<slide transition> <screen description – no audio> Slide transitions to completed appointments.

## Review 1

Let's review.

Whenever we complete an Initial Contact, we always want to add either a First Appointment Offered Date or a comment.

If we are able to provide an appointment **after** writing a comment, we should update it with the appointment date.

So, what happens if the participant or family doesn't call back right away?

<screen description – no audio> Slide transitions to Initial Contact for Ada Lott.

## No Call Back 1

Let's take a look at Ada Lott.

She had an Initial Contact created on 2/14.

The comment indicates that no appointment was available when she called and that she was asked to call back the next day.

It's now March 15, and if an appointment was scheduled and she were certified, the Initial Contact would not be considered complete because there is no First Appointment Offered Date documented.

## No Call Back 2

When Ada does call back, we can keep the original comment as an explanation and complete it by adding the date she called back as well as the date an appointment was then offered.

<screen description – no audio> Original Comment: No appt available – mom will call back tomorrow, 2/15. Added Comment: Mom called on 3/15 – able to schedule appt for 2PM today.

## No Call Back 3

The Comments field remains enabled to give us a place to provide an explanation for why the processing standards of 10 to 20 days after the Initial Contact date might not have been met.

And, keep in mind, if an Initial Contact is created and a certification isn't completed within 60 days, the system will delete the Initial Contact.

## ICs & VOCs 1

We have not reviewed VOCs, or Verification of Certifications which are out-of-state transfers, and Initial Contacts. That topic will be covered in the VOC training modules.

This concludes our review of Initial Contacts.

Click the button to continue.

## Test Your Knowledge

### Y/N Q#1

Yes or No?

Today is March 12. An appointment on February 7<sup>th</sup> that we scheduled 3 months ago for a subsequent certification was missed. Their Cert End Date was the last date in February. We are rescheduling their appointment. Do we need to create an Initial Contact when scheduling the appointment?

### Answer #1

The answer is Yes.

It doesn't matter if we are **rescheduling** a missed appointment. If the Cert End Date is before today's date, we must create an Initial Contact.

### T/F Q#2

True or False?

We should never complete an Initial Contact unless it's actually required.

### Answer #2

The answer is False.

In fact, many agencies choose to have staff always complete it so that it isn't forgotten. It doesn't do any harm to complete Initial Contacts even when not required.

### Y/N Q#3

Yes or No?

A breastfeeding woman has a Cert End Date in July. It's March today and we are scheduling an appointment to certify her as pregnant. Since she is still in a current certification, do we need to create an Initial Contact when scheduling this appointment?

### Answer #3

The answer is Yes.

All women being certified as pregnant must have an Initial Contact.

## Multiple Choice #4

Which statement is not true?

- A. An Initial Contact is required in Prescreen but we don't have to complete it while in Prescreen.
- B. WINNIE will require we complete an Initial Contact for all pregnant women during the certification if one hasn't already been completed.
- C. Generally, the Initial Contact should be completed by the staff person scheduling the appointment.
- D. An Initial Contact must be completed for any existing participants whose Cert End Date is before today.
- E. An Initial Contact isn't considered completed if it doesn't have either a First Appointment Offered Date or a Comment.

## Answer #4

The answer is B.

WINNIE will not require us to complete an Initial Contact for pregnant women unless she is new to WIC and being Prescreened. However, that isn't because she is pregnant, that's because the system requires all new participants being prescreened to have an Initial Contact.

## 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](mailto:health.wic@state.mn.us), [www.health.state.mn.us](http://www.health.state.mn.us); to obtain this information in a different format, call: 1-800-657-3942.*

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