

Managing the WIC Card 1A - WINNIE Online Training Module

AUGUST 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of managing representatives and setting the Primary Cardholder in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being August 29, 2023.

Overview 1

Households can designate three people, one Authorized Representative and two Alternate Representatives, who can assist the household with WIC activities, such as appointments and nutrition visits.

We also designate one of the representatives as the Primary Cardholder.

This is the representative attending the appointment when the WIC Card is issued.

<Transition Slide>

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

Demographics 1

We are starting in Geri Mander's folder, an infant whom we've just prescreened along with her mother, Sallie.

We manage representatives on the Manage eWIC Account page.

Go ahead and select Manage eWIC Account on the sidebar.

<Waiting>

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

Manage Account 1

The Manage eWIC Account pages are household-level, meaning they display the same information regardless of which member's folder we are working in.

Manage Account 2

It's composed of three different pages: Card History, eWIC Household Demographics, and Transaction History.

Besides Demographics, these are the only other pages that display the Household ID.

The default page it opens to is the eWIC Household Demographics.

Manage Account 3

We use this page any time we change a mailing address, transfer a household, add, edit, or delete representatives, as well as for managing the WIC Card, which includes setting the Primary Cardholder and assigning and deactivating it.

Authorized Rep 1

We're going to start with the Authorized Rep.

The Authorized Rep is usually added during Prescreen.

Again, it's most often the mother if she is on WIC and part of the household, or else it should be the Primary Caregiver.

Authorized Rep 2

If the person being designated the Authorized Rep is not a WIC participant, and not known to staff, we must always verify their identity before entering it into WINNIE.

Add Representatives 1

WINNIE will allow us to add one Authorized Rep and two alternate representatives.

Alternate Representatives have been designated by the Authorized Rep as "back-ups" and are people who can come to the WIC Clinic to receive nutrition and food benefits for the household.

Add Representatives 1A

All reps display in this Household Representatives grid and as long as there are fewer than 3 reps, the Add Representatives button is enabled.

Go ahead and click it.

<no audio> Click the Add Representatives button.

Add Representatives 1B

The Representative modal opens.

When we add representatives, WINNIE assigns the Authorized Rep first, followed by Alternate 1 and Alternate 2, so it displays the appropriate modal depending on which is being added.

Add Representatives 2

Only the First Name and Last Name are required for representatives.

They have character limits of 20 and 25, respectively.

In rare instances, we may have a representative with a hyphenated name that exceeds our character limit.

If this occurs, we should ask them which name they would prefer to use.

WIC STAFF: I'm so sorry but your last name is too long for me to enter. We can only use one of your last names. Which do you prefer use?

Add Representatives 2A

Both fields allow spaces, hyphens, periods, commas, and apostrophes.

Add Representatives 2B

Jerry Mander is Geri's grandfather and is going to be an alternate representative.

Let's add Jerry, with a J and Y, Mander.

Click into the First Name field, type Jerry, click into the Last Name field, and type Mander.

WIC STAFF: Is there someone else you'd like to be a backup for you?

PARTICIPANT: "Yes! Grandpa. His name is Jerry Mander, with a J and Y. Geri was named after him."

Add Representatives 3

<no audio> Click into the First Name field, type Jerry, click into the Last Name field, and type Mander.

<audio – hint> Type J-E-R-R-Y.

Add Representatives 4

<no audio> Click into the First Name field, type Jerry, click into the Last Name field, and type Mander.

Add Representatives 5

<no audio> Click into the First Name field, type Jerry, click into the Last Name field, and type Mander.

<audio – hint> Type M-A-N-D-E-R.

Add Representatives 6

Click the Relationship dropdown.

Add Representatives 7

The definition of the Relationship bears repeating.

If we choose to use this field, we want to select the option that best represents the representative's relationship to an infant or child in the household (even if there isn't currently an infant or child in the household).

Let's select Grandfather and save our changes.

<no audio> Select Grandfather and click the Save button.

Add Representatives 8

<no audio> Select Grandfather and click the Save button.

Add Representatives 9

Notice two things: WINNE automatically labels the second rep added as Alternate 1 and that the relationship does not display on this page but does display on the Household panel in Demographics.

Edit Representatives 1

Like all grids in WINNIE, we can edit our representative by either clicking the row to select it then clicking the Edit Representative button or double-clicking the row.

Edit Representatives 2

We are going to edit Jerry's information because he is actually Sallie's grandfather and Geri's great-grandfather.

Double-click on his row to edit and select Great-Grandparent instead.

WIC STAFF: I'm sorry! I should have clarified. Jerry's great grandpa?
PARTICIPANT: "Yes! Grandpa. Geri's Grandpa."

Edit Representatives 3

<no audio> Double-click Jerry's row to edit and select Grandfather.

Edit Representatives 4

<no audio> Select Great-Grandparent instead.

Delete Representatives 1

Notice the bright red Delete button?

Unlike most other grids in WINNIE, the Household Reps grid does not have a Delete button or icon.

We must edit in order to delete.

Delete Representatives 2

We can delete any representative without further ado, as long as a card has not been assigned to them (as we'll see in the next module).

Edit Representatives 4

For now, though, we're updating this information.

Hence, the Update button.

Go ahead and click it.

<no audio> Click the Update button.

Primary Cardholder 1

Whenever a representative's row is selected or highlighted, the Set Primary button is enabled.

Primary Cardholder 1A

The Primary Cardholder is the person to whom we issue the WIC Card.

Primary Cardholder 1B

A primary cardholder must be set before we can assign a card, and the Assign Card button is disabled until a primary is set.

Primary Cardholder 1C

This is the **representative at the appointment** when the card is assigned, and is usually a participant, parent, or guardian, and most often the Authorized Rep.

When setting the card's PIN or using Customer Service, it is the Primary Cardholder's Date of Birth (along with the household's mail zip code) that is used for validation.

Primary Cardholder 2

This means the Date of Birth **is required** for whichever representative is our Primary Cardholder.

Primary Cardholder 3

If we click the Set Primary button before adding the Date of Birth, a message displays indicating it's required.

Primary Cardholder 4

Let's set our Primary, who is going to be Sallie, our Authorized Rep, as is most often the case.

We will need to add her birth date first, which is 7/27/97.

Double-click Sallie's row and type her date of birth.

WIC STAFF: We're going to use your birth date when we set your WIC Card's PIN. Can you tell me...?

AUTHORIZED REP: Sure! It's 7/27/97

Primary Cardholder 5-6

<no audio> Double-click to edit Sallie's row and type her date of birth, 7/27/97.

Primary Cardholder 7

The Representative modal for Authorized Reps has a few more dropdowns, none of which we collect in MN (although our agency may choose to select the Education Level).

Our agency always selects the relationship so let's select Mother from the dropdown.

Primary Cardholder 8

<no audio> Select Mother from the Relationship dropdown.

Primary Cardholder 9

Click the Update button to save our changes.

Primary Cardholder 10

To set Sallie as our Primary Cardholder, we must first select her row.

If we don't the system will remind us.

Primary Cardholder 11

Go ahead and select Sallie's row then click the Set Primary button.

Primary Cardholder 12

<no audio> Select Sallie's row then click the Set Primary button.

Primary Cardholder 13

Three things happened: one, the Set Primary button is disabled but only because none of the reps are highlighted anymore.

Two, Primary is added to the Cardholder column for that representative.

And three, the Assign Card button becomes enabled because we now have a Primary Cardholder to whom we can assign a card.

Primary Cardholder 14

WINNIE has safeguards in place and will not allow more than one Primary Cardholder to be set nor will it allow assignment of the card to a representative that is not the Primary Cardholder.

Send eWIC Data 1

Almost any change we make to this page must be saved by communicating it to the WIC Processor, which we do by clicking the Send eWIC Data button.

However, we have more changes to make so we'll wait until those have been completed before clicking the button.

<Transition Slide>

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

MANAGING THE WIC CARD 1A

Test Your Knowledge

True/False Q#1

We can delete representatives by clicking the Delete button on the Household Representatives grid.

Answer #1

The answer is False.

Unlike other grids in WINNIE, the Household Representatives grid does not have a Delete button or icon. Instead, we must double-click a row or single-click and click the Edit Representative button. The Delete button is on the Representative modal that opens.

Multiple Choice Q#2

Which statement is false?

- A. The Primary Cardholder is the participant, parent, or guardian who is **at the appointment** when the WIC Card is assigned.
- B. Only the Authorized Representative can be the Primary Cardholder.
- C. WINNIE will not allow us to set more than one Primary Cardholder.
- D. We can only have 3 representatives (one authorized and two alternates).
- E. The Date of Birth is required for the Primary Cardholder because it is one of the validations used for the Customer Service line.

Answer #2

The answer is B.

Any of the representatives can be the Primary Cardholder. It is typically the Authorized Rep, but it does not have to be. However, it must be the representative at the appointment when the card is issued.

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.

MANAGING THE WIC CARD 1A

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